



• GROWING MEMBERS' FINANCIAL FUTURES •

**CALIFORNIA STATE TEACHERS' RETIREMENT SYSTEM**

**WORKFORCE STRATEGY PLAN**

Improve the work environment and internal efficiency

**Fiscal Years 2013-2017**

**CALSTRS**  
HOW WILL YOU SPEND YOUR FUTURE?

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# CALSTRS WORKFORCE STRATEGY FY 2013-2017

## INTRODUCTION

The CalSTRS Workforce Strategy Plan provides a framework for identifying the skills and competencies needed in the CalSTRS workforce today and in the future, and then selecting, developing, supporting and retaining that workforce.

The strategy draws on our history and identifies opportunities and challenges facing CalSTRS in response to our long-term strategic and business plans.

As an employer of choice, CalSTRS is committed to investing in the development of our most valuable asset, our employees, to build a strong, adaptable and diverse workforce to sustain us throughout our next 100 years.

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**CASSANDRA LICHNOCK, CALSTRS CHIEF OPERATING OFFICER**

# WORKFORCE PLANNING THE CALSTRS APPROACH

## WHAT IS IT?

Workforce planning is a systematic process that is integrated, methodical, and ongoing that involves the collection and analysis of past workforce patterns to prepare forecasts and develop recruitment, retention and succession strategies. Workforce planning is a dynamic and continuous process that extends beyond leadership succession to encompass all of the organization's staffing needs, now and in the future.

## WHY IS IT IMPORTANT?

Workforce planning enables an organization to proactively plan for and address changes in its strategic direction and the human capital required to meet organizational goals.

The ultimate goal of workforce planning is to ensure that the organization has the right number of people with the right skills in the right jobs at the right time.

## WHAT IS INVOLVED?

The process includes determining the number of workers and types of skills needed, where and when they will be needed and innovative strategy development to meet these requirements.

Workforce planning endeavors center around assessment of organizational workforce readiness and response to the ongoing operational and strategic needs of the organization. This effort is accomplished through activities such as recruitment, training, performance management, staff development, retention and organizational knowledge management to support the mission and goals of the organization.

## BACKGROUND

The Human Resources (HR) Branch supports the organization through its core objectives of: the development and management of the Workforce Strategy, Leadership Development and Succession plan and annual performance review and development cycle.

The CalSTRS Workforce Strategy is a high level analysis of the organization's workforce to address and support current needs and ensure adequate staffing for the strategic initiatives presented in the CalSTRS Strategic Plan for fiscal years 2012-2017.

## OBJECTIVES

The CalSTRS Workforce Strategy provides a high level view from which each CalSTRS employee can better understand the major workforce-based challenges the organization will face in alignment with ongoing mission critical activities and the future direction of the organization.

Over the next five years, and beyond, HR will continue to engage and work closely with leadership and staff on workforce planning activities.

Each branch of the organization will be involved in developing and realizing solutions to recruitment, retention, training, performance management, staff development and organizational knowledge management issues in order to best meet the demands of each branch's unique business need.

## **RESOURCES**

In support of CalSTRS ongoing efforts to reduce paper-waste, the supporting documents and resources used in the development of this strategy and referenced throughout may be found electronically at the links provided below.

## **RESOURCES**

CalSTRS Mission, Vision and Core Values  
Annual Business Plan 2012-2013  
Strategic Plan 2012-2017  
Competency Bridging Model  
Competency Library  
Classification Family and Code List

# STRATEGIC DIRECTION

## OVERVIEW

Human Resources used the foundational documents listed previously, and the environmental scan detailed in this section, to interpret relevant workforce data and develop recommendations for approaching the future of CalSTRS' workforce.

## CONTENTS

This section contains the following topics:

<b>TOPIC</b>	<b>SEE PAGE</b>
<a href="#">Strategic Direction</a>	<a href="#">9</a>
<a href="#">Human Resources SWOT Analysis</a>	<a href="#">10-12</a>
<a href="#">Competencies at CalSTRS</a>	<a href="#">13-14</a>

# STRATEGIC DIRECTION

## INTRODUCTION

The strategy map and information included below comes directly from the CalSTRS Business Plan 2012–2013 and will be updated to reflect annual changes to support the five-year strategic planning horizon.

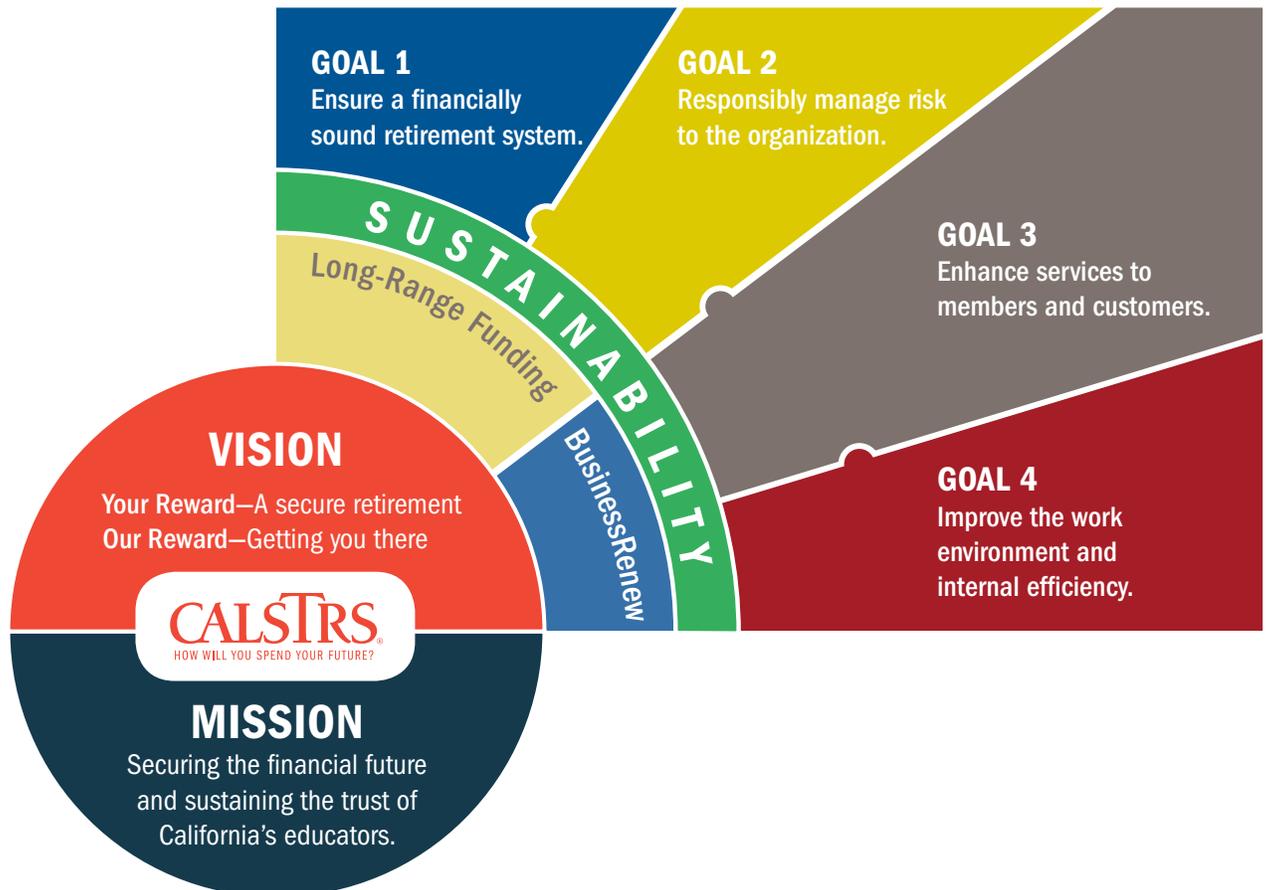
Two strategies continue to be the focal point for CalSTRS' commitment to sustained value: Long-Range Funding and BusinessRenew. CalSTRS listens to input from stakeholders, community, global partners, and employees, and aligns planning with a top-down

approach across four goal areas: Financial, Risk Management, Member/Customer, and Workforce and Process Improvement.

Objectives, initiatives and activities identified in the Business Plan provide the framework for action. Performance is measured through a combination of short- and long-term objectives across these goal areas.

## STRATEGY MAP

The strategy map below is a visual description of how the four goals interrelate to each other in support of CalSTRS mission and vision.



# HUMAN RESOURCES SWOT ANALYSIS

## INTRODUCTION

A SWOT analysis is used to evaluate strengths, weaknesses, opportunities, and threats.

An internal workforce planning specific SWOT analysis of human resources factors was conducted to identify opportunities and areas of improvement that affect CalSTRS current and potential workforce. This baseline analysis included staffing and workforce data, organizational structure, current and past practices, policies and projects specific to the Human Resources branch and the CalSTRS workforce.

The [Recommendations](#) section at the end of this document highlights CalSTRS strengths and opportunities, and seeks to resolve or improve upon the weaknesses and threats identified. These recommendations are designed to mitigate risk for CalSTRS and meet the strategic goals of the organization with the best benefit to members, leadership and staff.

## STRENGTHS

Below is a list of CalSTRS strengths from the HR/workforce management perspective:

- » A Human Resources Branch with an experienced, knowledgeable senior leadership team and representation at the Executive level.
- » Collaborative, committed staff that thrives on innovation and change.
- » A flexible, creative leadership team committed to a partnership approach across business areas.
- » Customer service-oriented HR services and support are delivered while maintaining traditional personnel control functions to mitigate risk.
- » A dedicated team focused on enterprise-wide strategic and tactical planning.
- » Facilitation of organizational key performance indicators and enterprise performance across and up and down business areas to create a foundation for alignment of individual accountability.
- » Coordination of risk management identification and reporting for the organization.
- » An HR division focused on internal organizational change management and employee relationship improvements, including regularly administered internal point-of-service and employee satisfaction surveys.
- » Experienced, specialized staff focused on executive and investment compensation to ensure competitive recruitment and retention solutions.
- » Intensive workforce, succession and diversity planning activities initiated through strategic plans and supported by the Executive Team.
- » A dynamic training program and dedicated training staff.
- » An internationally acclaimed employee recognition program.
- » A robust 12-month employee onboarding program.
- » A flourishing employee wellness program.
- » Active managerial development program.

## HUMAN RESOURCES SWOT ANALYSIS (CONT'D)

- » Active analyst and pre-analyst development programs.
- » Continuous selection and hiring process improvements for end-to-end service to customers.
- » An updated performance management process for leadership and updated performance management forms for rank and file staff, vetted and approved through the control agency and unions.
- » Expanded tracking and quality review of annual individual development plans.
- » Ongoing commitment toward a competencies-based human resources system.
- » Active management of employee performance through leadership and HR collaboration.

### WEAKNESSES

Below is a list of CalSTRS' potential weaknesses.

- » A limited pool of fully developed and prepared internal staff that can move easily into vacated positions.
- » Antiquated and inefficient:
  - › Processes and procedures
  - › State Systems (Classifications/Payroll/Exams)
  - › Programs
  - › Policies
  - › Rules
  - › Regulations
- » Inconsistent individual performance standards that consider both quality and quantity across diverse business areas.

- » Challenges due to manual data capture, incomplete data and lack of historical data to use for workforce planning and forecasting.

### OPPORTUNITIES

Below is a list of CalSTRS opportunities moving forward:

- » Automate CalSTRS Human Resources functions through the use of Share Point and other interim technology solutions.
- » Exploit the flexibility of Proposition 162 provisions for alternative management options and incentive compensation (i.e. executive and investment recruitments, matrix management, use of highly skilled project and technical specialists, etc.) to ensure the CalSTRS mission of Securing the financial future and sustaining the trust of California's educators is met.
- » Leverage Internal Control campaign to educate employees on how to mitigate risk related to workforce challenges at all levels of the organization.
- » Leverage the work of the Project Review Council (PRC) to efficiently manage resources to use for enterprise-wide projects.

### THREATS

Below is a list of CalSTRS' potential threats :

- » An aging and changing teacher workforce that will continue to increase the demand for CalSTRS services.
- » When the economy fully rebounds, there may be an exodus of trained staff due

## HUMAN RESOURCES SWOT ANALYSIS (CONT'D)

- to retirement or opportunities for higher compensation in the private industry.
- » Experienced employees will have to accept less pay in state service than their private industry counterparts.
- » Competition from other pension systems or governmental entities with more flexible classification and pay structures.
- » The State's antiquated hiring practices may impede employees from choosing state service.
- » State service does not currently have a quality brand identity which may affect recruitment.
- » The current intense public focus on public pensions (both the one CalSTRS manages, and the one state workers belong to) may impact recruitment.
- » There are no costs involved in transferring within state service for employees and there are many alternative state service organizations; this may impact retention.
- » Many other state departments offer desirable amenities such as Alternate Work Schedules, flexible work scheduling, free parking, on-site child care, telecommute, etc., which may impact recruitment and/or retention.
- » When experienced and trained staff leave CalSTRS, Onboarding and training costs rise, and institutional knowledge is potentially lost.
- » Some fields require unique skills, and are difficult to recruit for (Investments, Legal, Information Technology, Accounting, Finance, Procurement, Actuary, etc.).
- » Some fields have many applicants but extensive training of staff is required due to the complex nature of the system and outdated technology (Analytical, Customer Service and Personnel staff, etc.).
- » The management and reduction of excessive leave balances incurred from the preceding years of mandated furlough leave and the Personal Leave Program.

# COMPETENCIES AT CALSTRS

## INTRODUCTION

Competencies are measurable skills, knowledge, behaviors, organizational norms and other characteristics that are important for organizational success, personal performance and enhanced contribution in carrying out an individual's role and responsibilities.

Competencies create the foundation for future HR programs by:

- » Setting and understanding expectations of job knowledge and standard performance.
- » Creating consistent HR/workforce terminology and a shared language to be used across the organization to describe what type of job performance is needed and expected within CalSTRS.
- » Clarifying the steps necessary and available to grow/advance one's career.
- » Maintaining objectivity in the support of employee job skill development needs.
- » Providing one of the critical elements for successful recruitment and workforce planning.

CalSTRS identified a set of Core Competencies and sets of Classification Family Competencies in 2009 and implemented them in 2010. The Core Competencies and Class Family Competencies were developed using focus groups made up of employee representatives from all levels throughout the organization and were vetted and approved by the Executive Team.

## CORE COMPETENCIES

Core Competencies are those competencies that are essential for the success of each person throughout the organization and are directly related to the success of CalSTRS as a whole. Each competency selected includes, skills, knowledge, attitudes and behavioral indicators.

## CLASSIFICATION FAMILY COMPETENCIES

Classification Families are groups of classifications that are similar in level of responsibility and duties. They are used to support HR programs such as performance management, recruitment and selection in alignment with the State's civil service principles and rules. Class Family Competencies are also used in development and training of staff and are being systematically incorporated into duty statements, employment opportunity announcements, performance management documents, statements of qualification and interview questions.

## COMPETENCIES AT CALSTRS (CONT'D)

### EXECUTIVE KEY DRIVERS AND COMPETENCY BRIDGING

In the summer of 2012, the Executive team engaged in a series of facilitated group discussions and individual interviews to ascertain the key drivers to their individual and collective success. These key drivers were mapped to the existing CalSTRS Core and Classification Family competencies to establish Executive-level competencies.

The Executive-level competencies were then mapped to the Chief Executive Officer and Chief Investment Officer competencies to identify logical career paths and bridging competencies at all levels of leadership.

The competency bridging model approved in April 2013 details the pertinent skills, knowledge and abilities required for success as a leader at CalSTRS. This competency bridging model will drive the development of future performance management and leadership development programs.

# SUPPLY ANALYSIS

## OVERVIEW

An internal workforce supply analysis was completed referencing staff demographic data and historical turnover rates for calendar years 2008–2012. These analyses are meant to provide a baseline for projections only and do not reflect detailed skill or competency mapping, budgeted positions requested but not yet approved or external workforce supply.

## CONTENTS

This section contains the following topics:

<b>TOPIC</b>	<b>SEE PAGE</b>
<a href="#">Staff Demographics</a>	<a href="#">16-19</a>
<a href="#">Turnover Rates</a>	<a href="#">20</a>

# STAFF DEMOGRAPHICS

## INTRODUCTION

CalSTRS has a mix of employees representing the age groups and generations in the workforce today. Although each employee is an individual with his or her own influencers, traits, and values, generational descriptors can be used as high-level tools for generally understanding the differences between generational groups and why barriers to communication may exist.

When managed well, demographic differences can be advantageous to the organization, leading to innovative solutions to historical problems, greater efficiency, happier, healthier, more productive employees, and a more diverse and successful CalSTRS.

## GENERATION INFORMATION

The four generations currently in the U.S. workforce are generally known as Traditionalists, Baby Boomers, Generation X and Generation Y. There are very few Traditionalists still working as their generation is made up of people born in or before 1945. Baby Boomers are those born between 1946 and 1964. Generation X was born between 1965 and 1980. Generation Y was born between 1981 and 2000.

Each generation works differently with different needs, which means policies, procedures and programs currently in place may not work well for all groups. Generational differences and characteristics will play a key role in recruitment and retention strategies now and in the future.

The [Recommendations](#) section of this document seeks to alleviate the gap in understanding between generations and the different approaches and styles required to successfully manage this gap. The differences between the generations are defined in terms of the traditions, experiences, motivators, ambitions, expectations, and life/work styles that tend to be similar across a group of people who were in their formative years of childhood and young adulthood around the same time.

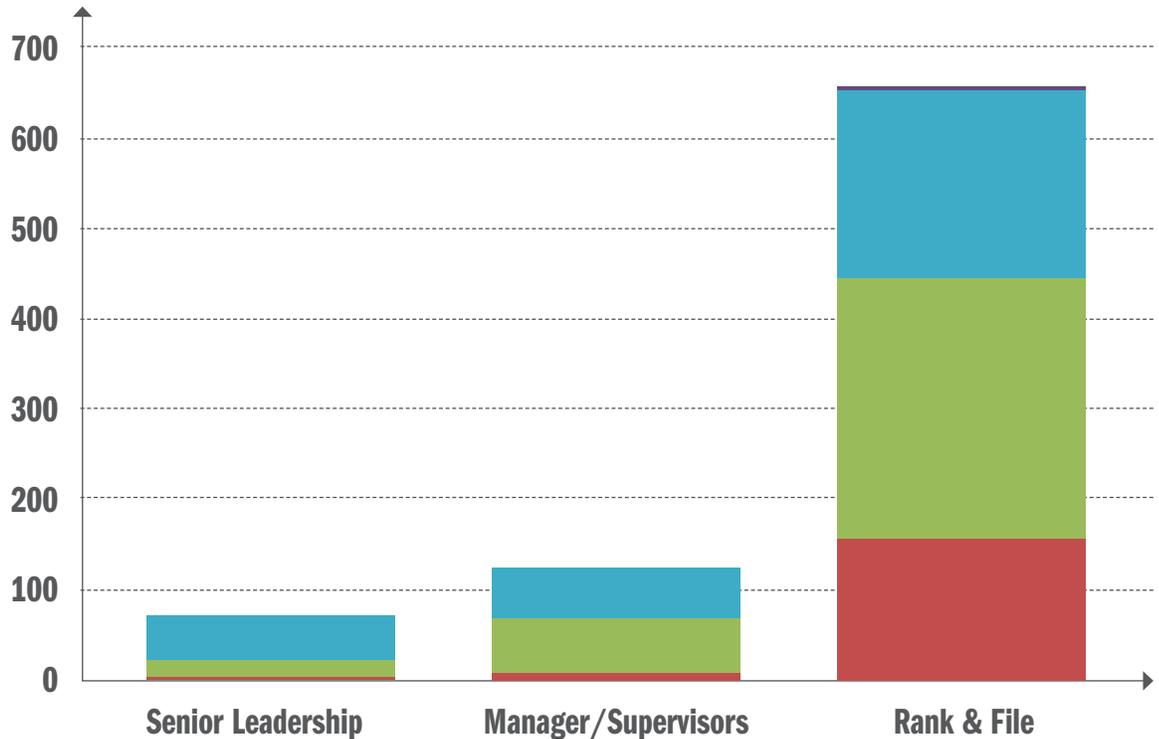
## LANCASTER/STILLMAN MODEL

The generational stratification used in this report is the Lancaster/Stillman model, developed in the early 2000s.

The full Lancaster/Stillman Generational Chart can be found in the Resources links.

## STAFF DEMOGRAPHICS (CONT'D)

### AGE/GENERATION BREAKDOWNS



<b>Traditionalist</b>	<b>0</b>	<b>0</b>	<b>3</b>
<b>Baby Boomer</b>	<b>49</b>	<b>56</b>	<b>208</b>
<b>Gen X</b>	<b>19</b>	<b>60</b>	<b>287</b>
<b>Gen Y</b>	<b>1</b>	<b>6</b>	<b>156</b>

The non-supervisory or rank and file staff is made up of a fairly even mix of all of the age groups, with 29 percent at or over 50 years of age.

In the Manager/Supervisor group, compiled of all of the frontline and second-level leaders (L1 & L2), 40 percent at or over the age of 50.

In the L2 mid-level managerial group 37 percent of the group is at or over the age of 50.

Please note: In future years, the baseline retirement risk analysis will be adjusted to include new retirement criteria, age 52 with five years of service, for employees hired on or after January 1, 2013.

The [Recommendations](#) section of this document outlines strategies currently being implemented to develop lower level staff and leaders in preparation for the natural demographic shift and anticipated retirements in all levels of the organization.

## STAFF DEMOGRAPHICS (CONT'D)

The riskiest potential “brain drain” is at the Senior Leader level comprised of Executives, Leader 4 (Director) and Leader 3 with 63 percent of incumbents at or over the age of 50.

We are already experiencing retirements in this critical group; the Chief of Staff retired in FY 11–12 and the Deputy Chief Executive Officer of Technology Services (formerly EIT) retired in March 2013. The [Recommendations](#) section of this document outlines the Executive Development Program and organizational changes being implemented now to bridge these impending leadership gaps.

Of particular interest is the 45 percent of employees over age 50 in the Technology Services (TS) Branch. This branch will likely become the most critical planning area over the 13–14 fiscal year as recruitment for lower-level staff is complicated by both private-sector competition, in terms of salaries, and constrained Information Technology (IT) classifications that require years of State experience for promotional eligibility. Long-term technology projects and the formation of the BusinessRenew (BR) Branch will further expand the need for qualified, experienced IT staff at all levels.

Additionally, CalSTRS will need to prepare IT staff for future support needs as new systems and other technology solutions are planned and implemented. For these reasons, both the TS and BR Branches will be the first to engage in Branch-level workforce and succession planning activities that include talent mapping, knowledge/skill forecasting and the identification of talent pools within and without the organization for targeted staff development and recruitment.

## CRITICAL PLANNING

It is critical that CalSTRS begin aggressively addressing its knowledge transfer and management strategies to retain the experience, historical background, institutional and industry knowledge that the leadership groups and veteran rank and file employees possess. The detailed strategies for knowledge transfer and management are outlined in the [Recommendations](#) section of this document and align with ongoing risk mitigation efforts and enterprise-wide training on Accountability and Internal Controls.

We continue to pursue and expand proactive leadership development and retention strategies to prepare future leaders to take over when current leaders retire or move on to other opportunities. Over the last two years, extensive training and outreach was conducted with leadership and staff to enforce the importance of annual performance reviews and career development as a standard practice at CalSTRS.

As a result of these efforts, the organization-wide average for rank and file employees with active annual individual development plans is currently at 95 percent. However, leadership lags behind this figure with an average rate of active development plans at 76, 72 and 29 percent, respectively for the Leader 1, Leader 2 and Director groups.

## STAFF DEMOGRAPHICS (CONT'D)

The baseline data collected from the annual performance review process is being used to identify areas of the organization that require immediate assistance with employee development and to address and mitigate lapses in performance. Competency-specific individual development plans are now tracked and analyzed to establish a quantifiable link to performance improvements related as a direct result of requested training. This data set will ultimately be used to identify employees who show a pattern of successful performance, year-over-year, and have an interest in actively developing their careers at CalSTRS.

These efforts are the foundation of succession planning at CalSTRS which aims to create a large, qualified, highly adaptable workforce and talent pool within the organization through leadership and management development programs. Please see the Leadership Development Succession Plan FY 13-17 for full details about succession planning efforts.

# TURNOVER RATES

## INTRODUCTION

Turnover is a normal and natural occurrence for any organization. According to the Society for Human Resources, state/local governments typically are among the industries with the lowest turnover rates at 9 percent. The generally accepted standard of healthy levels of turnover for any organization is under 15 percent annually.

## ENTERPRISE-WIDE TURNOVER

The current turnover rate target set for CalSTRS enterprise-wide is 10 percent. This target is based on the HR Modernization Project 2008 Survey of State Departments in which 39.7 percent of respondents had a turnover rate between 5–10 percent.

CalSTRS tracks and calculates turnover on a three-year rolling cycle. Over the past three years, CalSTRS has had an average annual turnover rate of 66 employees or 7.4 percent. The majority of this turnover is attributable to transfers of employees from CalSTRS to other state departments and retirements. While this turnover rate is generally seen as acceptable in terms of human resources metrics, the loss of key individuals can be distressing.

The turnover of experienced individuals in Investments, Financial, Technology, Legal and specialized Personnel roles are of constant concern. Qualified candidates in these fields are in high demand and thus the recruitment of them requires special attention and effort.

There are many recruitment and retention strategies in the [Recommendations](#) section of this document intended to attract qualified individuals and lower general turnover due to transfers, resignations, and dismissals. HR is actively using many of these recommended strategies and continues to explore ways to push beyond the status quo of existing State Civil Service recruitment methods.

# DEMAND ANALYSIS

## OVERVIEW

A demand analysis was completed using Executive, Director and Human Resources staff input to account for future staffing needs, upcoming changes to the organization, and effects of adjustments in the strategic direction of the department.

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This section contains the following topics:

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<a href="#">Areas Affected by CalSTRS</a>	
<a href="#">Strategic Direction</a>	<a href="#">22</a>
<a href="#">Branch-specific Demand Analyses</a>	<a href="#">23</a>
<a href="#">Additional Factors</a>	<a href="#">24</a>

# FUTURE STAFFING REQUIREMENTS

## INTRODUCTION

Human Resources conducted a workforce assessment based on historical staffing data over a five-year period (2008–2012) and reviewed current and future business plans impacting anticipated organizational changes. This assessment serves to estimate internal organizational needs in the near future, and to plan for upcoming organizational changes.

## ONGOING ORGANIZATIONAL NEEDS ASSESSMENTS

To glean additional information pertaining to anticipated needs due to strategic initiatives, projects and external factors, annual workforce needs assessments sessions will be conducted in FY 13–14 and beyond. These branch and division-level sessions will include a review of the competency requirements, capacity of existing staff and current and potential staffing challenges unique to each business area.

# AREAS AFFECTED BY CALSTRS STRATEGIC DIRECTION

## INTRODUCTION

The strategic goals, objectives and initiatives as shown in the Strategic Plan 2012–2017 and the Business Plan 2012–2013, affect every part of the organization.

This section identifies those branches of the organization most affected by each strategic goal.

## BUSINESS AREAS IMPACTED

The business areas most impacted by Goal 1: Ensure a financially sound retirement system, are:

- » Audit Services
- » Investments
- » Plan Design and Communication
- » Financial Services
- » General Counsel

The business areas most affected by Goal 2: Responsibly manage risk to the organization, are:

- » All branches

The business areas most affected by Goal 3: Enhance services to members and customers, are primarily:

- » Benefits and Services
- » Plan Design and Communication
- » Financial Services

The business areas most affected by Goal 4: Improve the work environment and internal efficiency, are:

- » All branches; however, Audit Services, Human Resources, Technology Services, Financial Services and BusinessRenew are heavily emphasized.

# BRANCH-SPECIFIC DEMAND ANALYSES

## NEED FOR BRANCH-SPECIFIC DEMAND ANALYSES

Demand analyses specific to each branch of the organization will be critical moving forward. By developing demand analyses and workload assessments for each branch, Human Resources and each business area, in partnership, will be able to target the needs of the individual branches.

HR is addressing immediate staffing needs as follows:

- » Increased recruitment of analytical staff in the Customer Service Division.
- » Continued recruitment and transition of contract Benefits Counselors, support staff and management into state employees related to the Member Service Center expansion.
- » Added Investments staff at the Portfolio Manager and Investment Officer I levels enabling more in-house investment fund management functions.
- » Establishment of new Pension System Accounting classification and other staff increases and organizational realignments in the Financial Services Branch related to BusinessRenew.

Where and when it is feasible, Human Resources will spearhead enterprise-wide cross functional teams to address workforce issues common to multiple business areas.

# ADDITIONAL FACTORS

## INTRODUCTION

Two additional critical factors for the organization are:

- » Public Employees' Pension Reform Act (PEPRA)
- » Human Resources technology solution

## PEPRA

The Public Employees' Pension Reform Act of 2013 will affect the workload of many of our CalSTRS staff, and will have an impact retirement benefits for both our current and future members, and current and future staff.

Additionally, the impact of the changes for new employees may have an unintended negative effect on the state's ability to attract new teachers and new civil service staff.

## HR TECHNOLOGY SOLUTION

It is critical that CalSTRS obtain an HR technology solution or an information management system in order to meet the needs of the organization.

An HR technology solution will allow HR to better serve the organization by:

- » Dramatically decreasing risk related to compensation, benefits, and other sensitive personnel and human resources issues.
- » Mapping and identifying end-to-end return on investment (ROI) costs associated with employee recruitment, retention, training and development.
- » Increasing stewardship to the organization and customer/client focus by allowing human resources staff to spend more time analyzing data and creating and implementing solutions and/or programs and less time collecting and tracking the data manually.
- » Providing better customer service with more services available to staff and leadership, including real-time reporting related to all aspects of Human Resources functions and personnel related data.

# GAP ANALYSIS

## OVERVIEW

The topics in this section discuss projections in staffing needs from 2013 through 2017 for the organization as a whole and branch-by-branch. Some specific division-level information has been included where major organizational changes were recently implemented.

## CONTENTS

This section contains the following topics:

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# ORG-WIDE GAP ANALYSIS

## INTRODUCTION

For both the “Best Case Scenario” and the “Worst Case Scenario” shown below, Human Resources elected to assume that there will be no increase in budgeted positions. This assumption allows for a point in time staffing forecast to be used as a baseline upon which future budgeted positions can be requested and allocated.

The information in the tables below is based on the workforce data as of April 2013.

The steps used to complete the gap analyses included below are outlined in the Resources links.

## BEST CASE SCENARIO

The estimates in the “Best Case Scenario” table do not include the potential retirements of employees over the next five years.

BEST CASE SCENARIO	
Current Filled Positions	845
Anticipated staffing increase*	0
Current Vacancies	79
Total # of Staff Required	924
Current Filled Positions	845
Expected Attrition Rate x 5 years**	465
Total Projected Internal Supply	380
Total # of Staff Required	924
Total Projected Internal Supply	380
Total Gap in Staffing due to Attrition	544

## WORST CASE SCENARIO

The “Worst Case Scenario” table includes the potential retirements CalSTRS could sustain over the next five years.

WORST CASE SCENARIO	
Current Filled Positions	845
Anticipated staffing increase*	0
Current Vacancies	79
Total # of Staff Required	924
Current Filled Positions	845
Expected Attrition Rate x 5 years**	465
Potential retirements in next 5 years	73
Total Projected Internal Supply	307
Total # of Staff Required	924
Total Projected Internal Supply	307
Total Gap in Staffing due to Attrition	617

## ANALYSIS

The best case scenario based on this data is that CalSTRS will have to replace 544 employees over the next five years. The worst case scenario based on this data is that CalSTRS will have to replace 617 employees over the next five years.

To help mitigate risk in this gap in staffing, Human Resources offers recruitment, retention, training and development, and knowledge transfer and management strategies in the [Recommendations](#) section of this report.

# BRANCH-SPECIFIC GAP ANALYSES

## INTRODUCTION

The following tables include information specific to each branch of the CalSTRS organization as of April 2013. This data set is pulled biannually to reflect a point in time for forecasting and does not assume annual increases in budgeted positions, as noted above.

- \* Anticipated staffing increase is set at 0 for baseline setting purposes. In future revisions, approved budgeted positions in the following fiscal year will be included in staffing forecasts.
- \*\* Expected Attrition Rate x 5 years is each branch's average annual attrition rate (based on the past five years) multiplied by 5 years (this Plan's expiration date).

## EXECUTIVE

The Executive Branch Management team has five filled positions and one vacancy. Although there is no attrition expected, there is the potential that one member of this team will retire within the next five years.

The total number of new staff potentially needed by the Executive Branch Management team in the next five years is two.

EXECUTIVE BRANCH MANAGEMENT (UNITS 100, 101)	
Current Filled Positions	5
Anticipated staffing increase*	0
Current Vacancies	1
<b>Total # of Staff Required</b>	<b>6</b>
Current Filled Positions	5
Expected Attrition Rate x 5 years**	0
Potential retirements in next 5 years	1
<b>Total Projected Internal Supply</b>	<b>4</b>
Total # of Staff Required	6
Total Projected Internal Supply	4
<b>Total Gap in Staffing due to Attrition</b>	<b>2</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### GENERAL COUNSEL

The General Counsel Branch has 28 filled positions, three vacancies, and expected attrition of 24 people over the next five years.

Additionally there are four employees who will be retirement eligible in the next five years.

General Counsel may need to make 31 hires during the next five years to stay fully staffed.

GENERAL COUNSEL (UNIT 102)	
Current Filled Positions	28
Anticipated staffing increase*	0
Current Vacancies	3
<b>Total # of Staff Required</b>	<b>31</b>
Current Filled Positions	28
Expected Attrition Rate x 5 years**	24
Potential retirements in next 5 years	4
<b>Total Projected Internal Supply</b>	<b>0</b>
Total # of Staff Required	31
Total Projected Internal Supply	0
<b>Total Gap in Staffing due to Attrition</b>	<b>31</b>

### AUDIT SERVICES

The Audit Services Division has 22 filled positions, four vacancies, and expected attrition of 14 people over the next five years. Three Audit Services employees are eligible to retire within the next five years.

As shown in the table below, Audit Services will potentially face a staffing gap of 21 people over the next five years.

AUDIT SERVICES (UNIT 103)	
Current Filled Positions	22
Anticipated staffing increase*	0
Current Vacancies	4
<b>Total # of Staff Required</b>	<b>26</b>
Current Filled Positions	22
Expected Attrition Rate x 5 years**	14
Potential retirements in next 5 years	3
<b>Total Projected Internal Supply</b>	<b>5</b>
Total # of Staff Required	26
Total Projected Internal Supply	5
<b>Total Gap in Staffing due to Attrition</b>	<b>21</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### FINANCIAL SERVICES

The Financial Services Branch has 140 filled positions, six vacancies, and expected attrition of 81 people over the next five years. Eight Financial Services employees are eligible to retire within the next five years.

Based on the data in the table below Financial Services will need to make at least 95 hires over the next five years.

<b>FINANCIAL SERVICES (UNITS 201, 236, 265, 270, 280)</b>	
Current Filled Positions	140
Anticipated staffing increase*	0
Current Vacancies	6
<b>Total # of Staff Required</b>	<b>146</b>
<hr/>	
Current Filled Positions	140
Expected Attrition Rate x 5 years**	81
Potential retirements in next 5 years	8
<b>Total Projected Internal Supply</b>	<b>51</b>
<hr/>	
Total # of Staff Required	146
Total Projected Internal Supply	51
<b>Total Gap in Staffing due to Attrition</b>	<b>95</b>

### HUMAN RESOURCES

The Human Resources Branch has 50 filled positions, one vacancy, and expected attrition of 35 people in the next five years. Three branch employees are eligible to retire within the next five years.

It is anticipated that the Human Resources Branch will need to make at least 39 hires over the next five years.

<b>HUMAN RESOURCES (UNITS 223, 261)</b>	
Current Filled Positions	50
Anticipated staffing increase*	0
Current Vacancies	1
<b>Total # of Staff Required</b>	<b>51</b>
<hr/>	
Current Filled Positions	50
Expected Attrition Rate x 5 years**	35
Potential retirements in next 5 years	3
<b>Total Projected Internal Supply</b>	<b>12</b>
<hr/>	
Total # of Staff Required	51
Total Projected Internal Supply	12
<b>Total Gap in Staffing due to Attrition</b>	<b>39</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### BENEFITS AND SERVICES

The Benefits and Services Branch has 324 filled positions, 34 vacancies, and expected attrition of 195 people over the next five years. There are 30 employees who will be retirement eligible in the next five years.

Benefits and Services will potentially face a staffing gap of 259 people over the next five years.

In January 2013, the Client Outreach and Guidance (COG) Division was reorganized into the Benefits and Services Branch to improve services to members and operational efficiencies. This Division was moved from the Plan Design and Communication Branch and as such, the five-year employee movement history associated with COG is shown in the Benefits and Services Branch staffing gap forecasts.

As part of the Member Service Center Expansion, and to mitigate risk to the organization associated with using contract employees to conduct core business, the COG Division is actively converting select contracted benefits counseling and support staff positions into state employees to staff each new regional office. This ongoing process serves to retain the institutional knowledge of trained, experienced contract staff while maintaining service levels to members, and establishes a more stable, responsive, and accountable workforce. Until 2011, offices outside of headquarters were staffed exclusively through the contract procurement process in collaboration with county offices of education, rather than through the standard state hiring process. Due to this expansion and change in staffing approach,

hiring forecasts and budgeted positions for the Benefits and Services Branch will need to be increased to adequately staff both headquarters and statewide member service centers in future years.

<b>BENEFITS AND SERVICES (UNITS 401, 430, 434, 435, 437, 475, 860, 861, 862, 864)</b>	
Current Filled Positions	324
Anticipated staffing increase*	0
Current Vacancies	34
<b>Total # of Staff Required</b>	<b>358</b>
<hr/>	
Current Filled Positions	324
Expected Attrition Rate x 5 years**	195
Potential retirements in next 5 years	30
<b>Total Projected Internal Supply</b>	<b>99</b>
<hr/>	
Total # of Staff Required	358
Total Projected Internal Supply	99
<b>Total Gap in Staffing due to Attrition</b>	<b>259</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### PLAN DESIGN & COMMUNICATION

The Plan Design and Communication Branch has 48 filled positions, 6 vacancies, and expected attrition of 30 people over the next five years. There are nine employees who will be retirement eligible in the next five years.

Plan Design and Communication will potentially face a staffing gap of 45 people over the next five years.

<b>PLAN DESIGN &amp; COMMUNICATION (UNITS 801, 820, 830, 835, 840, 855, 875)</b>	
Current Filled Positions	48
Anticipated staffing increase*	0
Current Vacancies	6
<b>Total # of Staff Required</b>	<b>54</b>
<hr/>	
Current Filled Positions	48
Expected Attrition Rate x 5 years**	30
Potential retirements in next 5 years	9
<b>Total Projected Internal Supply</b>	<b>9</b>
<hr/>	
Total # of Staff Required	54
Total Projected Internal Supply	9
<b>Total Gap in Staffing due to Attrition</b>	<b>45</b>

### CLIENT OUTREACH & GUIDANCE

Client Outreach & Guidance has 58 filled positions, 6 vacancies, and expected attrition of 15 people over the next two years. There are 5 employees who will be retirement eligible in the next two years.

Client Outreach & Guidance may need to make 26 hires during the next two years to stay fully staffed which does yet not include year-over-year expansion plans or anticipated shifts of current contracted employees into state employees.

<b>CLIENT OUTREACH &amp; GUIDANCE (UNITS 860, 861, 862, 864)</b>	
Current Filled Positions	58
Anticipated staffing increase*	0
Current Vacancies	6
<b>Total # of Staff Required</b>	<b>64</b>
<hr/>	
Current Filled Positions	58
Expected Attrition Rate x 2 years**	15
Potential retirements in next 2 years	5
<b>Total Projected Internal Supply</b>	<b>38</b>
<hr/>	
Total # of Staff Required	64
Total Projected Internal Supply	38
<b>Total Gap in Staffing due to Attrition</b>	<b>26</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### INVESTMENTS

The Investments Branch has 107 filled positions, ten vacancies, and expected attrition of 24 people over the next five years. An additional 11 Investments employees are eligible to retire within the next five years.

As shown in the table below, Investments will potentially face a staffing gap of 45 people over the next five years.

<b>INVESTMENTS (UNITS 301, 310, 350)</b>	
Current Filled Positions	107
Anticipated staffing increase*	0
Current Vacancies	10
<b>Total # of Staff Required</b>	<b>117</b>
<hr/>	
Current Filled Positions	107
Expected Attrition Rate x 5 years**	24
Potential retirements in next 5 years	11
<b>Total Projected Internal Supply</b>	<b>72</b>
<hr/>	
Total # of Staff Required	117
Total Projected Internal Supply	72
<b>Total Gap in Staffing due to Attrition</b>	<b>45</b>

### TECHNOLOGY SERVICES

The Technology Services Branch has 123 filled positions, fifteen vacancies, and expected attrition of 65 people over the next five years. Nine branch employees are eligible to retire within the next five years.

It is anticipated that Technology Services will need to make 89 hires during the next five years.

There will be significant impact and demand for HR services over the coming years to fully staff the BR Branch. The BR Branch will be staffed with existing CalSTRS staff and newly recruited staff will also be added over the next few years. Initially, we anticipate significant internal movement of staff primarily from the TS, FS and B&S Branches. Once baseline hiring and attrition patterns are established for this Branch, Branch-specific gap analysis will be added.

<b>TECHNOLOGY SERVICES (UNITS 601, 626, 630)</b>	
Current Filled Positions	123
Anticipated staffing increase*	0
Current Vacancies	15
<b>Total # of Staff Required</b>	<b>138</b>
<hr/>	
Current Filled Positions	123
Expected Attrition Rate x 5 years**	65
Potential retirements in next 5 years	9
<b>Total Projected Internal Supply</b>	<b>49</b>
<hr/>	
Total # of Staff Required	138
Total Projected Internal Supply	49
<b>Total Gap in Staffing due to Attrition</b>	<b>89</b>

## BRANCH-SPECIFIC GAP ANALYSES (CONT'D)

### POTENTIAL CHANGES

Upon completion of branch-specific demand analyses, Human Resources will have a better understanding of the most critical gaps in the CalSTRS workforce.

Branch-specific demand analyses will potentially change the gap analyses with additional information directly from each branch about their needs. The gap analyses will be expanded to include newly forming branches once they are fully formed and staffed.

It is expected that CalSTRS will gain full approval for an increase in budgeted positions in FY 13–14. The Budget Change Proposals have already been vetted and approved by the Executive team and the Teachers' Retirement Board. Future staffing forecasts will reflect these additions upon receipt of final approval for budgeted positions from the Legislature and the Governor.

# YEAR-OVER-YEAR ACTION PLAN

## OVERVIEW

In this section HR has assembled a list of recommended strategies to use for combatting the workforce gaps indicated previously in this Workforce Strategy document.

## CONTENTS

This section contains the following topics:

<b>TOPIC</b>	<b>SEE PAGE(S)</b>
<a href="#">Recommendations</a>	<a href="#">35-40</a>
<a href="#">Projects in Progress</a>	<a href="#">41</a>

# RECOMMENDATIONS

## INTRODUCTION

The following recommendations are broken into groups of solutions for next steps, knowledge transfer and management, recruitment, training and development, retention, and general recommendations for HR.

## NEXT STEPS

The following items are the suggested next steps in the workforce planning process.

- » Work with the Project Review Council, led by the BREO, to identify the recommendations in this Workforce Strategy document that can be immediately and/or easily implemented, as well as those that should be deferred to future years.
- » Conduct a feasibility study with Human Resources Senior leadership against all of the recommendations to determine resources and timelines needed for successful completion in alignment with the CalSTRS Strategic Plan and annual HR Branch Management goals.
- » Prioritize the recommendations by organizational criticality in alignment with the CalSTRS Strategic and Leadership Development and Succession Plans.
- » Develop measures with the Strategic Planning team to determine the success of implemented workforce strategies.
- » Annually review and reevaluate the CalSTRS Workforce Strategy and Leadership Development and Succession Plans and the branch/division level plans to make sure current strategic initiatives are included and any changes (economic, environmental, etc.) in the workforce are identified.

## KNOWLEDGE TRANSFER AND MANAGEMENT

The recommendations listed below are related to knowledge transfer and management.

### FY 2012-2013 AND BEYOND/ONGOING:

- » As part of risk mitigation enterprise-wide:
  - › Initiate a campaign to educate leaders and veteran CalSTRS employees on the importance of sharing knowledge.
  - › Document current procedures.
  - › Document current processes.
  - › Review, update and/or create electronic desk manuals, as applicable.
  - › Establish functional back-ups for each position at the unit, division and branch levels.
  - › Institute an initiative to scrub Central for outdated policies, common procedures, etc., to streamline the accessibility and accuracy of information.
  - › Analyze and utilize information garnered through the standardized exit interview questionnaire given to all separating employees.
  - › For employees not currently falling under the standard review process, such as limited-term employees, develop an assessment process for potential candidate status for future positions.
- » Budget permitting:
  - › Use the Administratively Established Position process to hire *before* a position becomes vacant.
    - Use the incumbent to help hire and train their successors.

## RECOMMENDATIONS (CONT'D)

### FY 2013–2014:

- » As part of findings from Executive Development pilot program:
  - › Invite lower-level leaders and staff members into key stakeholder groups to expand or establish relationships.
  - › Facilitate workshops with senior staff—storytelling as information exchange.
  - › Encourage and allow regular job shadowing opportunities at all levels of the organization.
  - › Exploit cross training through formal Training and Development assignments.
  - › Develop and implement a formal mentorship program.
    - If successful as part of Executive Development pilot program, roll-out to lower-level leadership groups in subsequent years.
- » As part of risk mitigation:
  - › Conduct Critical Incident Interviews with key staff to ensure mission critical events are captured, documented and a resource is available for successors or those tasked with addressing these incidents in the future.
- » Budget permitting:
  - › Create information and experience sharing sub sites or “Communities of Practice” for various CalSTRS projects or programs on SharePoint/Central.
  - › Continue to expand the use of SharePoint as a workflow and efficiency tool.

### FY 2015–2016:

- » Budget/interest permitting:
  - › Develop a “Leave a Legacy” program:
    - Video interviews conducted by newer staff of veteran staff with organization/industry knowledge.
    - Digitized and cataloged by topic, searchable by keyword, housed on Central or SharePoint sites, as applicable.
    - Possibly develop into Podcasts for employees to view on mobile devices.

## RECRUITMENT

The recommendations listed below are recruitment strategies.

### FY 2012–2013 AND BEYOND/ONGOING:

- » Complete the Pension Program Series classification study, including providing recommendations on changes to compensation levels and advanced business knowledge and technology needs in support of enterprise-wide technology projects.
- » Finalize the establishment of the Pension Financial Accounting classification and begin utilizing this classification.
- » Encourage staff and leadership to utilize current professional and educational networks to assist in recruitment efforts.
- » Complete reorganization activities related to the BusinessRenew Branch.
- » Pursue statutory positions for Chief Financial Officer (CFO) and Chief Operating Officer (COO).

## RECOMMENDATIONS (CONT'D)

- » Finalize reorganization activities related to the establishment and selection of the Chief Operating Officer and Chief Financial Officer.
- » Align and update the classification specification and compensation levels for the Deputy Chief Investment Officer.
- » Further expand recruitment through alternate channels, such as: outreach via Monster.com, Careerbuilder, Craigslist, NeoGov, LinkedIn and other web-based recruiting channels.
- » Update the career page on CalSTRS.com to reflect and heavily market CalSTRS as an employer of choice.
- » Enhance and support Selection Services by creating a standardized path for recruiting those unfamiliar with the CalHR system:
  - › Establish a job aid to be added to CalSTRS.com career site to assist potential candidates in navigating the Open Exam system.
  - › Research and pilot electronic application submission process through CalSTRS.com.
- » Institute a stringent enterprise-wide candidate screening process that adheres to the State's civil service principles, and supports CalSTRS culture of excellence:
  - › Utilize in-house HR expertise in application screening criteria focused on quality candidate selection.
  - › Require an initial writing sample or other technical pre-screen mechanism prior to setting interview for hires, when appropriate.
  - › Require timed onsite interview screening exercises, prior to interview, targeted to unique business needs.
- › Utilize HR Analysts as partners on interview panels.
- › Institute a casual "team fit" second interview process to allow trusted/key unit members to assess the candidate.
- » Continue to instruct internal staff on proper interviewing, application and resume preparation techniques to assist them in competing for internal positions through formal classroom training and one-on-one coaching.
- » Utilize more assertive marketing language in employment opportunity bulletins and CalSTRS.com to highlight what CalSTRS has to offer versus other agencies:
  - › Noble mission
  - › Strong vision
  - › A values-centric culture focusing on quality services to the member
  - › Innovative, collaborative and leading-edge public agency
  - › A culture of excellence that promotes employee development and ample training opportunities
  - › Accessible leaders
  - › High-end workspace experience from café to desktop equipment to telephones to meeting spaces
  - › Convenient location
  - › Cite internal promotion rates when audience is appropriate
  - › Highlight the internationally renowned employee recognition program: Virtuosity
  - › Active employee Onboarding program
  - › Low-cost, covered parking with 24-hour security

## RECOMMENDATIONS (CONT'D)

- › Sustainability:
    - Platinum LEED certified building with controlled temperature and lighting
    - An active and forward-thinking recycling program
    - A self-contained compost program
  - › Active wellness programs:
    - State-of-the-art gym onsite
    - Ergonomic assessments and injury prevention
    - Healthy menus at the café
    - Bike borrowing program
    - Friendly competitions such as miles ridden during May is Bike Month and miles walked in Walk Across America
    - Weight Watchers® at work
    - Encouraged use of the Riverwalk for exercise and recreation
    - Ongoing wellness brown bag lunch series and online resources
    - Onsite blood drives every eight weeks through BloodSource
  - › Alternate transportation encouraged:
    - Preferred parking for low emissions and hybrid vehicles
    - Bike cage for bicycle commuters to safely store their bikes
    - Public transportation offsets
    - Active carpooling/vanpooling programs
    - Commuter of the month highlighted in employee newsletters
  - » Utilize talent management database to identify internal candidates for positions and increase internal promotion rates.
  - » Develop formal Human Resources Diversity Program to attract a further diversified workforce.
    - › Define “diversity” as it pertains to CalSTRS workforce in alignment with Investments and pending Sustainability policies, as appropriate.
    - › Identify diversity gaps by using the internal talent management database to map current staff education, experience and career paths.
    - › Develop diversity profiles for targeted recruitment based on gaps identified in talent management database.
  - » Utilize social networking sites, not only to build CalSTRS reputation with public, but as a way to attract candidates through pre-recorded video peer/member testimonials.
    - › Encourage employees to “friend” CalSTRS on Facebook to show pride in employment, guided by CalSTRS Social Media policy, as appropriate.
    - › Use internal social networking software fields to encourage cross collaboration, employee networking and to build employee talent profiles.
  - » Expand employee education as it pertains to career/competency development paths through a formal Career Counseling program.
- FY 2013-2014:**
- » Create talent management database to map all current CalSTRS employees’ education, career path, work experience and special skills.

## RECOMMENDATIONS (CONT'D)

### FY 2014–2015:

- » Develop a formal Internship program in collaboration with UC Davis, CSU Sacramento and private advanced degree programs to attract, train and create a candidate pool of potential hires in critical or recruitment-difficult positions (i.e. Information Technology, Investments, General Counsel, Accounting, etc.)

## TRAINING AND DEVELOPMENT

### FY 2013–2014 AND BEYOND:

The recommendations listed below are training and development strategies and assume the use of an HR technology solution.

- » Provide management and staff with training progress reports biannually.
- » Focus on competency assessment and development, using rolling three-year baseline performance data to identify competency gaps.
- » Use employee competency assessments and documented developmental activities to build a pool of candidates capable of promoting, within the State's civil service rules.
- » Develop a full-fledged Professional Development program to ensure rank and file employees are being properly prepared for higher-level duties.
- » Establish an Upward Mobility goal and metrics of success.
- » Institute formal rotational assignments to cross train and strengthen system knowledge.

- » Promote and exploit developmental work assignments at every level of the organization, ensuring that all training activities are reinforced and immediately utilized in program areas.
- » Add accountability service level agreement for payment of missed or late drop courses for all internal training to better manage training costs and resources.

## RETENTION

The recommendations listed below are retention strategies.

### FY 2012–2013 AND BEYOND/ONGOING:

- » Assess the maturing Wellness and Onboarding programs and continue to heavily market their long-term benefits to leadership and staff.
- » Continue promoting the use of CalSTRS' recognition program, Virtuosity.
- » Consider telework or mobile office work opportunities.
- » Continue promoting employee development through self-advocacy and personal action rather than reliance on management as driver.
- » Continue to address poor performers timely to enforce a culture of excellence and adherence to standards.
- » Create secondary channel for employee suggestions via a monthly contest to promote innovation and efficiencies at grass roots.

## RECOMMENDATIONS (CONT'D)

- » Conduct early intervention interviews.
  - › Use mediation techniques to encourage positive communication and early intervention for at-risk employees or poor team fit.
- » Develop best practices metric for employee ROI.
- » Institute internal CalSTRS career fairs to assist in cross-functional transfer and/or resource management.

### GENERAL FOR HUMAN RESOURCES

The recommendations listed below are recommendations for the Human Resources Branch specifically.

#### **FY 2013-2014 AND BEYOND:**

- » Immediately institute technology solutions for data capture and process efficiencies in HR:
  - › Document current HR processes and develop “to be” process streamlined through technology solution. (FY 2012-2013)
- » Create Human Resources Branch SharePoint site to clarify roles and responsibilities of each division and unit in HR for internal customers.
- » Establish standard off-boarding/separation process.
- » Continue to expand consultant model versus control model for services to other business areas.
- » Develop implementation plans for chosen workforce strategies.
- » Map return on investment (ROI) for end-to-end employee costs that includes: wages, benefits, training, development, equipment and other associated costs.
- » Offer alternate/flexible work schedules (currently under consideration).
- » Develop drilled down, division-specific workforce and succession plans based on enterprise-wide and branch-wide gap analyses and branch/division level Enterprise Management goals.

# PROJECTS IN PROGRESS

## INTRODUCTION

During the development of this Workforce Strategy document, CalSTRS has begun work on or otherwise implemented several employee-related programs.

## CURRENT PROJECTS

Below is a list of recommendations that are ongoing or are currently being implemented:

- » Executive Development Program
- » Leadership Forums
- » Manager Academy
- » Analyst Academy
- » Pre-analyst Academy
- » Project Review Council  
(HR - voting member)
- » Pension Solution Enterprise Information Management (HR - voting member/  
business partner)
- » Align and track individual development plans with training offerings annually.
- » Review and analyze onboarding and employee engagement surveys for immediate course correction, where applicable.
- » Continue to promote and heavily utilize Virtuosity recognition program.
- » Further incorporate generational complexity into management training.
- » Continue to refine the performance management system and coaching efforts enterprise-wide.



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